EC

Evolving-Consulting

Reach your business & technology goals without any budgetary distress.

Sales Cloud & HubSpot Integration Package

Quick and easy implementation, you will receive a tailored setup based on industry best practices, guidance from our experts, training session and support during Go-Live.

Scope Breakdown	Hrs	Cost in CAD
Project Management	4	$560.00
Lead Management Process	6	$840.00
HubSpot Integration (Prospects to Leads)	10	$1,400.00
Account & Contacts Management	3	$420.00
Opportunity Management Process	11	$1,540.00
Email/Calendar Sync	1	$140.00
Data Import	4	$560.00
Reports & Dashboards	4	$560.00
Training	2	$280.00
Go Live & Post Live Support	5	$700.00

Total Hours: 50
Total $7,000.00

What is included?

- **Project Management & updates**
- **1on1 Requirement Gathering sessions & walk-thru**
- **Lead Management Setup:**
  - Web-to-Lead form
  - Assignment Rules (Round robin or Criteria Based)
  - Object setup, Custom fields, record types, layouts and validation rules.
  - Up to 2 Lead Qualification process (Lead Status)
  - Lead field mapping (Lead conversion)
  - List views
- **Account & Contact Management Setup:**
  - Object setup, Custom fields, record types, layouts and validation rules.
  - List views
- **Opportunity Management Setup:**
  - Up to 2 Sales Processes (Opportunity Stages); includes the setup of Salesforce guidance for success for the Sales path.
  - Object setup, Custom fields, record types, layouts and validation rules.
  - List views
- **Opportunity Product Setup:**
  - Object setup, Custom fields, record types, layouts and validation rules.
- **Product Management Setup:**
  - Object setup, custom fields and layouts.
  - Up to 2 Price books
- **HubSpot Setup**
  - Install HubSpot connector
  - Setup Sync Field mapping
- **Task Management Setup:**
  - Object setup, Custom fields, record types, layouts and validation rules.
  - List views
- **Reports and Dashboards:**
  - Evolving-Consulting out of the box reports
  - Evolving-Consulting out of the box Sales Dashboard
- **App Setup:**
  - Custom Sales app
  - Custom Home Page
- **Email Sync**
- **Standard Duplicate and Matching rules**
- **Security Setup (Profiles)**
- **Data Upload**
- **2hrs of custom training**
- **5hrs of post - Go Live support**

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What's Next?

When you are ready to work with us, let us or your Salesforce Account Manager know. We will then send you the following documents:

- ❑ ***Service Agreement***
- ❑ ***An invoice for 50% of the estimate.***

Once we receive a signed service agreement and proof of payment we will schedule a Kick-off call to start our project.

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